

Introduction

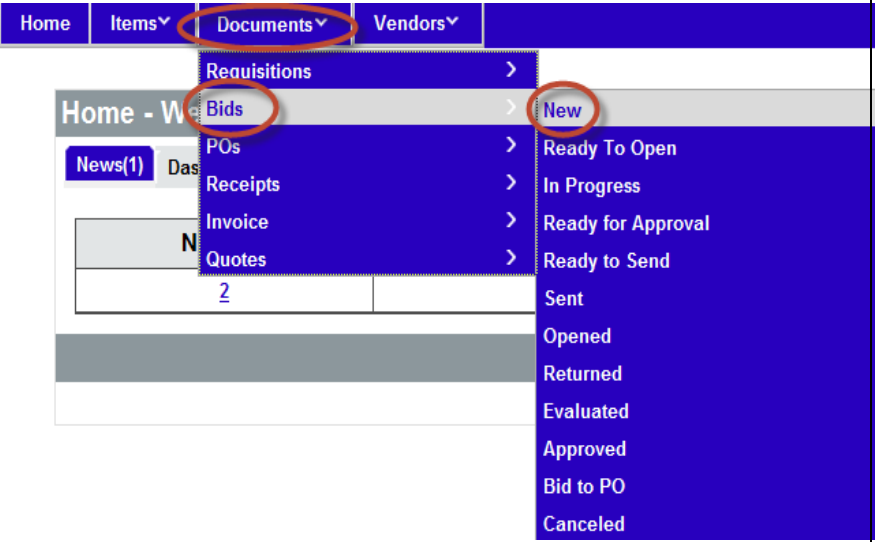
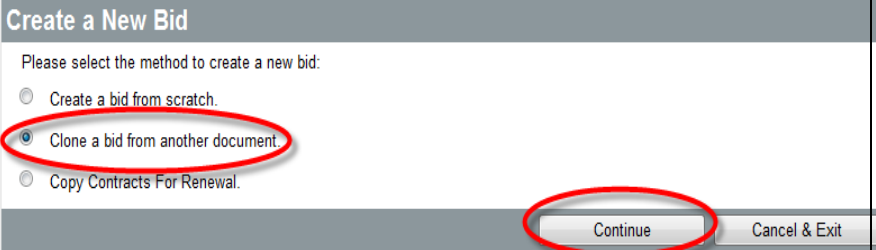
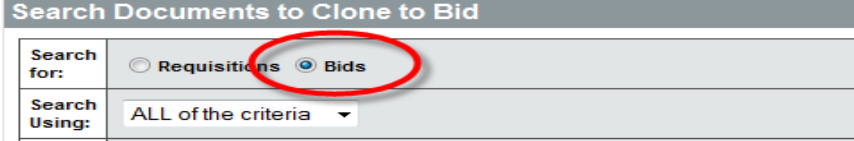
The “How to Clone a Bid from another Document” Quick Reference Guide is designed to provide the minimum steps necessary in cloning (copying) a Bid.

Cloning a Bid makes a new copy of the document, enabling you to leverage the information that was already entered on the original, but also giving you the ability to edit anything where necessary.

Pre-requisites

You must have the Basic Purchasing Role.

Steps

<p>Step 1:</p> <p>a.) From the home screen once Logged in, select Documents > Bids > New.</p>	
<p>Step 2:</p> <p>a.) Click the clone a bid from another document radio button.</p>	
<p>Step 3:</p> <p>The Search Documents to Clone a Bid screen displays.</p> <p>a.) First, select Bids in the “Search For” field.</p> <p>b.) Determine which search fields you want to use (a couple are highlighted in red).</p>	

- c.) Once you have entered in your search criteria, click the **Find it** button.

Search Criteria Form:

- Bid #
- Bid Description
- Bid Opening Date (MM/DD/YYYY)
- Purchaser: Chavez, Isidra
- Organization
- Department
- Location
- Type Code
- Catalog
- Purchase Method
- Entered Date (MM/DD/YYYY)
- NIGP Class
- NIGP Item
- Commodity Code
- Find it** (circled in red)
- Clear

Step 4:

The Results page displays.

- a.) Scroll down and select the document you want to clone by selecting the appropriate radio button.
- b.) Click the **Clone Bid & Exit** button.

Note: If other items need to be added, you can also click the **Clone Bid & Add more items** button.

Results

Select	Bid #	Description	Purchase Method	Bid Opening Date	Dept/Loc	Purchaser	Total	
<input checked="" type="radio"/>	AGENCY14B0001833	QRG	Open Market	07/24/2014 12:01:00 PM	6412000 / 52300	Isidra Chavez	\$0.00	In Prog
<input type="radio"/>	AGENCY14B0001806	Revision Testing	Open Market	07/03/2014 09:15:00 AM	6412000 / 52300	Isidra Chavez	\$0.00	Open
<input type="radio"/>	AGENCY14B0001568	coffee	Open Market	04/09/2014 02:55:00 PM	6412000 / 52300	Isidra Chavez	\$0.00	Approv

Buttons: **Clone Bid & Exit** (circled in red), **Clone Bid & Add More Items** (circled in red), **Exit**

Step 5:

The page refreshes to the **General Tab**.

- a.) Enter in your bid available & opening date, funding source, and **edit** any other necessary fields.

Note: There will be a validation error message indicating missing fields, be sure to complete them.

Open Market Bid AGENCY15B0001948 Status: 2BI - In Progress

General (circled in red) | Items | Address | Accounting | Routing | Attachments(2) | Notes | Bidders | Questions | Amendments | Q & A | Reminders | Summary

General Validation Errors

- The following required fields are missing: bid opening date, available date.
- The following required fields are missing: [Funding Source].

Bid Number: AGENCY15B0001948

Status: 2BI - In Progress

How Solicited: Email

Department*: 6412000 - Purchasing

Location*: 52300 - office services

Show on Web: ☒

Required Date:

Available Date* (MM/DD/YYYY HH:MM:SS AM or PM): (circled in red)

Description*: breathalyzer testing

Purchaser*: Chavez, Isidra

Type Code:

Fiscal Year: 2015

Organization: Department of Technology Management and Budget

Allow Electronic Response: ☒

Bid Opening Date* (MM/DD/YYYY HH:MM:SS AM or PM): (circled in red)

Purge Date: (MM/DD/YYYY)

Funding Source*: (circled in red)

Step 6:

- a.) Follow the same process you would when creating a normal bid.

Move from left to right on the tabs.

Note:

When you get to the Bidders Tab, you MUST refresh the previous Vendor list by marking the check box in the “Delete Column” located in the upper left corner. If you fail to do this the system will send an email notification to the previous vendor list. Follow the same process on a normal bid to add your new Vendor list.

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